

## **e-Branch Change Process**

The following is a summary of the process that takes place when considering changes to the software or hardware upon which the e-branch system operates.

- I. Monitoring - Monitor blogs and other news sources for notices and updates of system software
- II. Preparing
  - a. Review expected outcomes of change
    - i. What features/functions will be altered?
    - ii. What benefits/risks do such changes present?
  - b. Potential changes are considered in light of the system priorities
    - i. Security
    - ii. Stability
    - iii. Sustainability
    - iv. Scalability
    - v. Usability
    - vi. Retaining Features
    - vii. Adding New Features
  - c. Decision to proceed
- III. Testing and Evaluation
  - a. Installation of system on testing server
  - b. Test key functionality and compatibility with related software/services
  - c. If errors are encountered in testing, then
    - i. Make adjustments to local system if it's a local issue
    - ii. Submit error/bug reports to software source
    - iii. Retest after adjustments
  - d. Decision to proceed
- IV. Scheduling and Notification
  - a. Schedule date for system change
  - b. Notify users of expected change – timing and what changes they can expect via e-branch blog, LibIdaho mailing list, Newsletter, and/or Email to e-branch site contacts
  - c. Update e-branch manual to reflect system changes
- V. Installation
  - a. Create full system backup for roll-back just-in-case
  - b. Install change
- VI. Retest and Finalize
  - a. Test key functionality
  - b. Decision to maintain change
  - c. Determine and, if necessary, remove related software made unnecessary by change.